

NEAT Features

Check In / Check Out



United States Department of Energy
Weatherization Assistance Program
Weatherization Assistant
Version 8.2.4.2
12/29/2004



National Energy Audit Tool (NEAT)
Developed by Oak Ridge National Laboratory



Manufactured Home Energy Audit (MHEA)
Developed by the National Renewable Energy Laboratory

1/24/05

1

NEAT Features - Check In / Check Out

Each machine that is going to be taken out into the field appears to need the following things implemented before doing the first check in / check out. These steps will smooth the way for subsequent use.

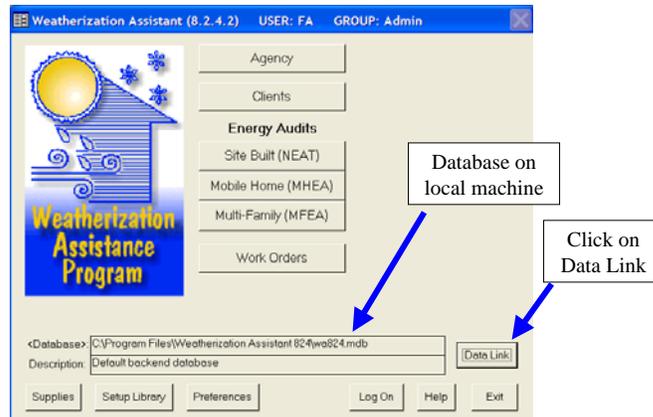
1. Create your agency in the local version of the database (wa824.mdb) that can be found in the path "C:\Program Files\Weatherization Assistant 824" on the laptop or tablet computer (field computer).
2. Set up at least the agency contacts that will be using the field computer in the check in / check out mode. Use the exact same contact info that is set up for those people in the network backend database.
3. Create a copy of the supply library for your agency on the field computer. This is really only required if the user intends to run the audit to generate recommendations while not connected to the network backend database. The supply library doesn't currently appear to get dragged along to the field computer during the check-out / check-in process.

1/24/05

2

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Local database is set up on the laptop or tablet computer (field computer) with the steps on the previous slide already performed. In this example the current user is an agency contact named Field Auditor. Click on Data Link to go through the process to re-connect to the network backend database. This process is described in the file "NEAT Connection to Network Database.pdf"

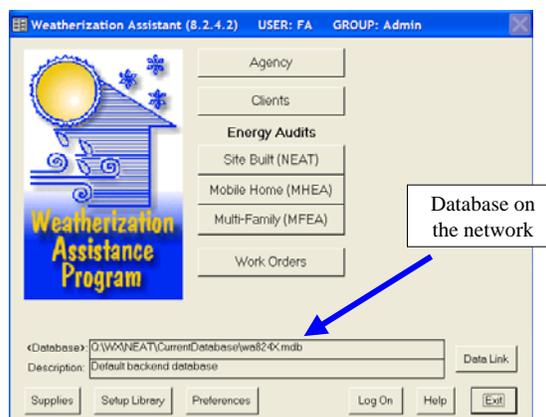


1/24/05

3

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After going through the Data Link process and connecting to the network database, that new database is shown on the Main screen. This is the database from which Client records will be checked out.



1/24/05

4

NEAT Features - Check In / Check Out

This example uses Anoka County Community Action Program as the agency. There are three clients currently in the network database, with two of them having audits downloaded from eHEAT.

Agency Name: Anoka County Community Action Prog
 State: MN
 Address: 1234 5th Street
 City: Anoka
 Agency Type: Local Community Action Agency
 Federal ID Num: []
 EIN: []
 Other ID Num: []
 Comment: []
 Web Page URL: []
 Email: auditors@anoka.com

AGENCY: by Name [] of 5 Copy Del
 REPORT: Select Report: Scheduled Audits Select Clients: 1 selected
 Preview Print PDF File Snapshot File Explore

1/24/05

5

NEAT Features - Check In / Check Out

In this example we will check out the two client records (2045 and 3000) that have audits started. This check out process can be performed two different ways. The first way is by checking out each client record individually from the Client screen. The second way is shown starting on Slide 17. Using the first approach, access the Client screen from the Audits tab by double-clicking on Client ID 2045.

<Client ID>	Alt. Client ID	<Audit Name>	Type	Last Edited	Status
2045	271	NEAT	NEAT	12/29/2004	Site Visit Completed On
3000	wx3000-1	239	NEAT	12/27/2004	Site Visit Scheduled For

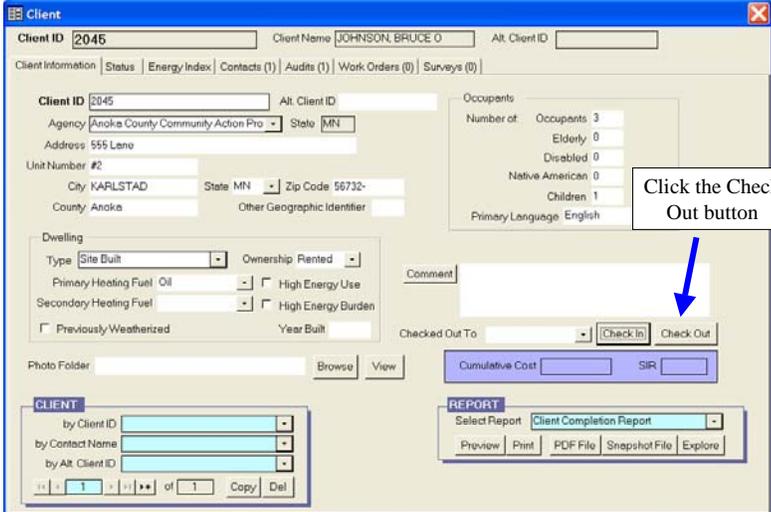
Record: 1 of 2
 Read Only - Use for Sort/Find

1/24/05

6

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This opens the Client screen. Click the Check Out button to check out the client record to FA, which is the currently logged in user.



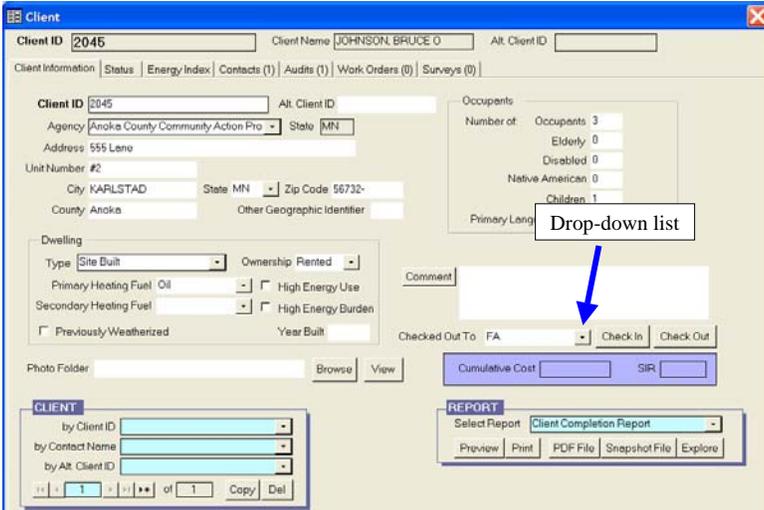
The screenshot shows the 'Client' window for Client ID 2045, named JOHNSON, BRUCE O. The 'Checked Out To' dropdown menu is open, and the 'Check Out' button is highlighted with a blue arrow. A callout box points to the 'Check Out' button with the text 'Click the Check Out button'. The interface includes fields for Agency (Anoka County Community Action Pro), Address (555 Lane), City (KARLSTAD), State (MN), and Zip Code (56732). It also has sections for Dwelling (Type: Site Built, Ownership: Rented), Occupants (3), and a REPORT section with 'Client Completion Report' selected.

1/24/05

7

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The client record is now checked out to user FA. You can also pick a different user from the drop-down list of who checked-out to, but logged in user is selected by default.



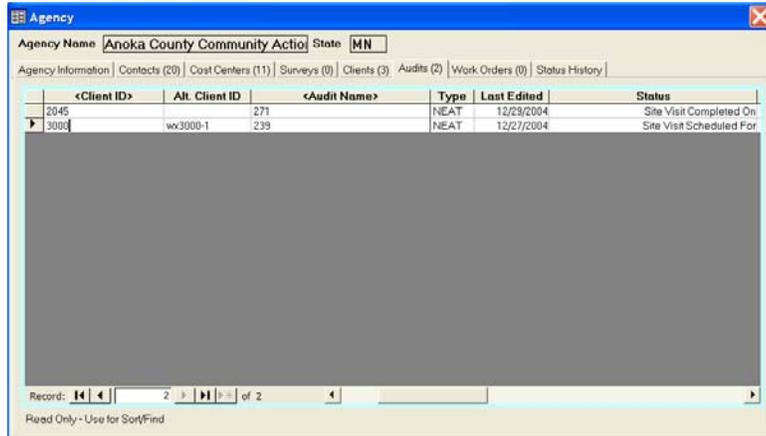
The screenshot shows the 'Client' window for Client ID 2045, named JOHNSON, BRUCE O. The 'Checked Out To' dropdown menu is now set to 'FA'. A callout box points to the dropdown menu with the text 'Drop-down list'. The interface is identical to the previous screenshot, but the 'Checked Out To' field has been updated.

1/24/05

8

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Follow the same process for Client ID 3000. Either close the previous screen and double-click on Client ID 3000 from the Audits tab (below) to open the Client screen again, or navigate to Client ID 3000 from the Client search in the lower left corner of the Client screen.



1/24/05

9

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Client ID 3000 is now checked out to FA also.

The screenshot shows the 'Client' window for Client ID 3000, 'LEIRAN, HELENE'. The 'Audits' tab is active, showing 'Checked Out To: FA'. The form includes the following fields and sections:

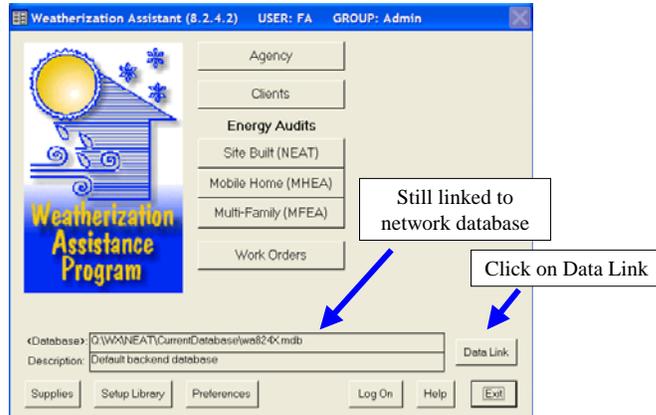
- Client Information:** Client ID 3000, Client Name LEIRAN, HELENE, Alt. Client ID wx3000-1.
- Agency:** Anoka County Community Action Pro, State MN.
- Address:** 1700 WIDMAN LANE #240C, City CROOKSTON, State MN, Zip Code 56716, County Anoka.
- Occupants:** Number of Occupants 1, Elderly 1, Disabled 0, Native American 0, Children 0, Primary Language English.
- Dwelling:** Type Multifamily (5 or more units), Ownership Rented, Primary Heating Fuel Wood, Secondary Heating Fuel, High Energy Use, High Energy Burden, Previously Weatherized, Year Built.
- Checked Out To:** FA, with 'Check In' and 'Check Out' buttons.
- Photo Folder:** Browse, View.
- CLIENT Search:** by Client ID, by Contact Name, by Alt. Client ID.
- REPORT:** Select Report Client Completion Report, with buttons for Preview, Print, PDF File, Snapshot File, and Explore.

1/24/05

10

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Return to the main screen and click on Data Link. Still currently linked to the network database.

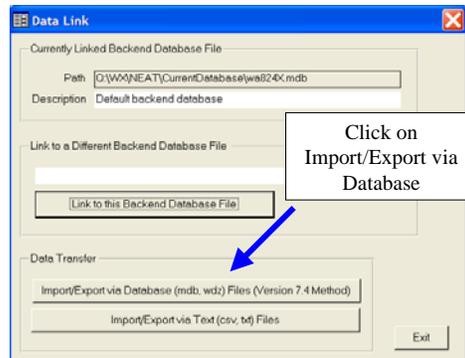


1/24/05

11

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Select Import/Export via Database

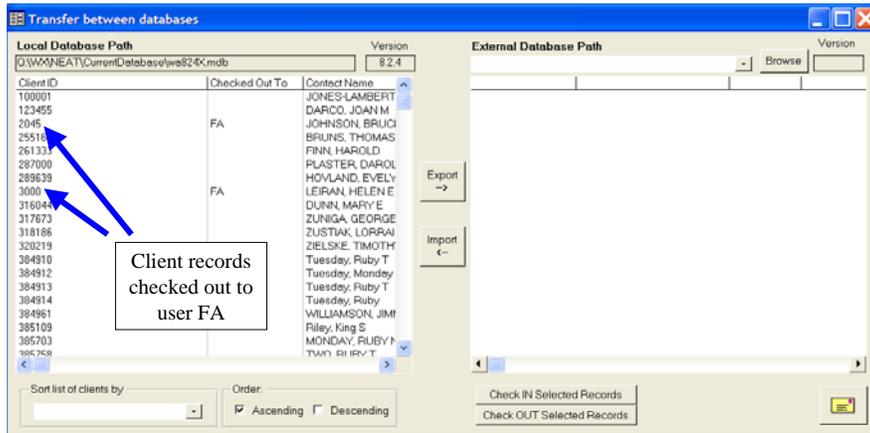


1/24/05

12

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Shows client records on the left, including noting which clients (Client IDs 2045 and 3000) are checked out.

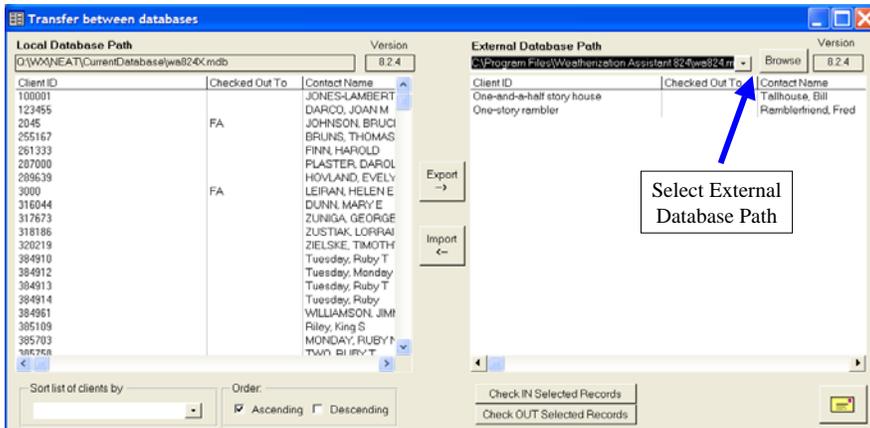


1/24/05

13

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Select the external database path TO which the clients are to be copied and checked out to (the path to the database on the field computer), either by clicking on Browse and navigating, or by selecting from the drop-down list.

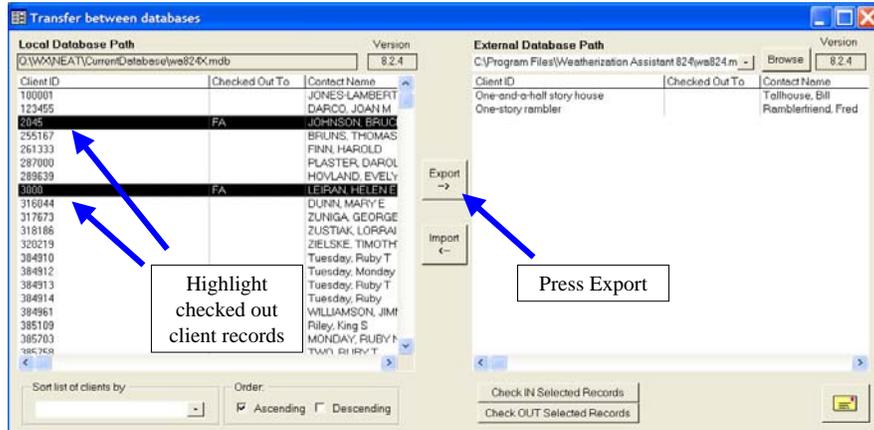


1/24/05

14

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Highlight the clients that have been checked out and which want to move to the field computer database. Click on Export. Lower left corner of screen will show progress.

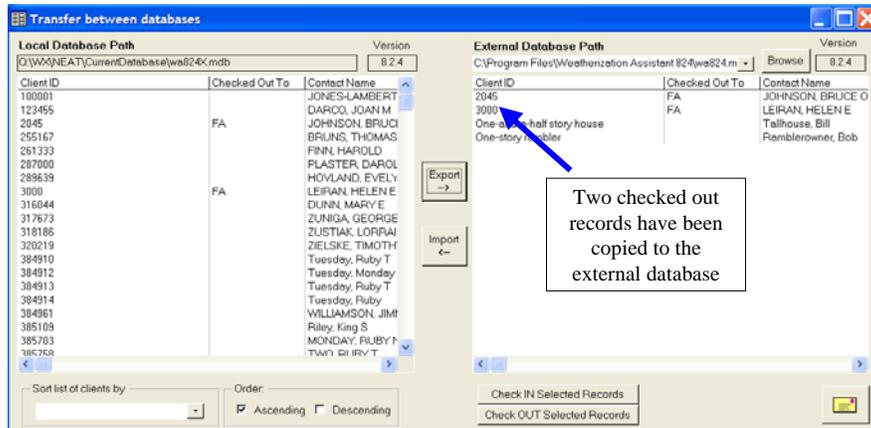


1/24/05

15

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When completed, the checked out client records are now also in the database file on the field computer.

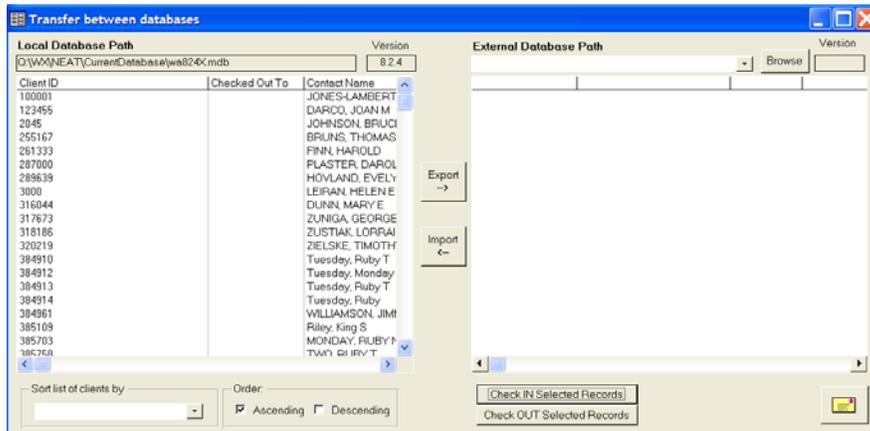


1/24/05

16

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The following three slides show the second way that client records can be checked out. Multiple records can be checked out directly from this screen, rather than one at a time from the Client screen.

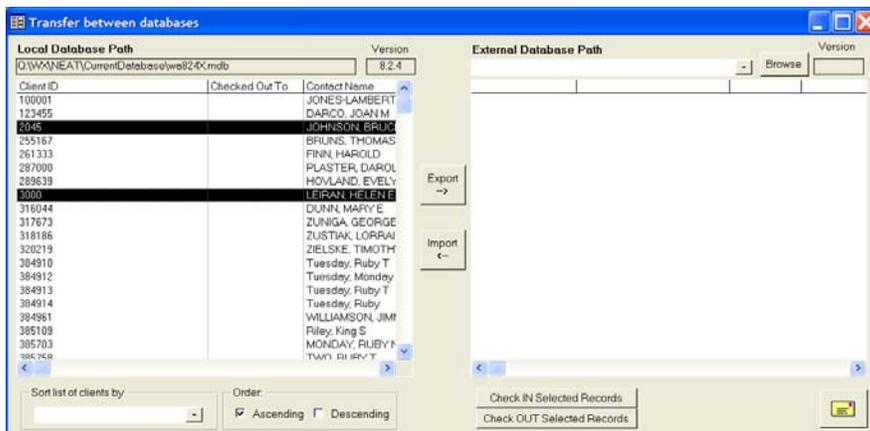


1/24/05

17

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Highlight the clients that you want to check out and then press the "Check OUT Selected Records" button at the bottom. Highlighting the records is done by using the mouse to click on a record. Standard Windows methods for selecting multiple records can be used - e.g. press the CTRL key and click on additional individual records to highlight them, or click on a record and then press the SHIFT key and click on another record to highlight all records in between.

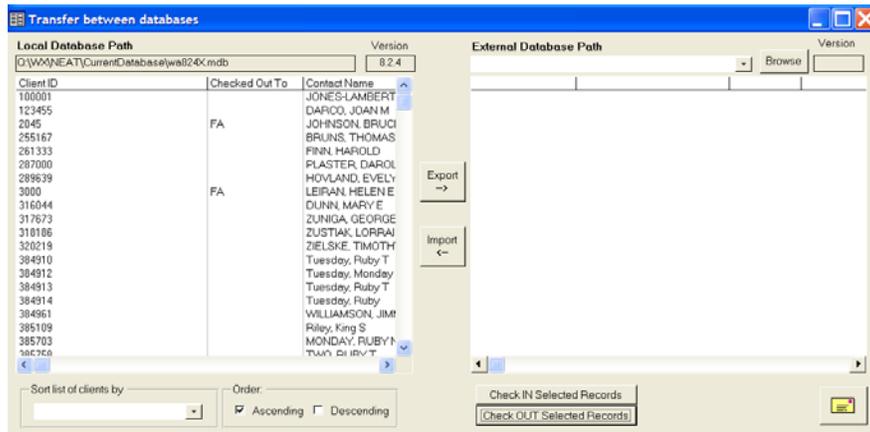


1/24/05

18

NEAT Features - Check In / Check Out

This produces the same result as shown previously on Slide 13.



1/24/05

19

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Still connected to network database. Select Data Link to connect to local database on field computer.

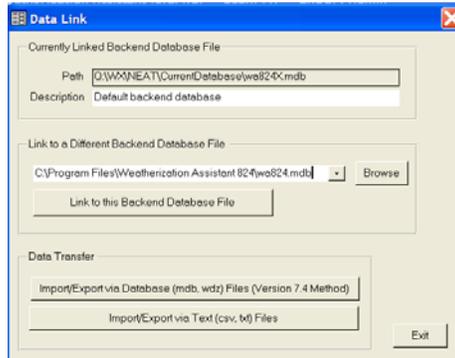


1/24/05

20

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Selected the local database and Link to this Backend Database File

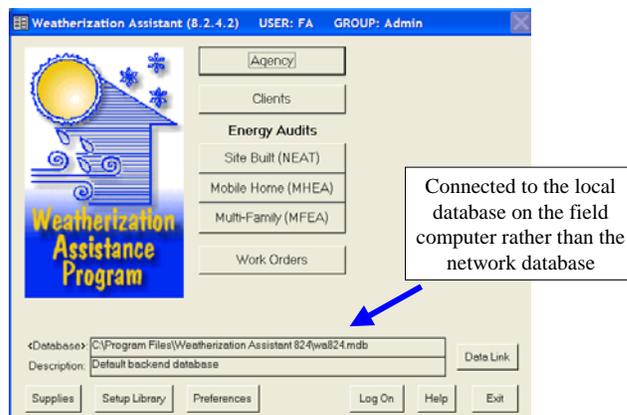


1/24/05

21

NEAT Features - Check In / Check Out

After logging back in the user is now connected to the local field computer database.



1/24/05

22

NEAT Features - Check In / Check Out

Go to Agency screen to see have 2 client and 2 audit records which were transferred to this database.

The screenshot displays the 'Agency' screen in a web application. The title bar reads 'Agency'. The main content area is divided into several sections:

- Agency Information:** Agency Name: Anoka County Community Action, State: MN. Navigation tabs include: Agency Information, Contacts (20), Cost Centers (11), Surveys (0), Clients (2), Audits (2), Work Orders (0), and Status History.
- Agency Details:** Agency Name: Anoka County Community Action Prog, Address: 1234 5th Street, City: Anoka, State: MN, Agency Type: Local Community Action Agency.
- Identification:** Federal ID Num, EIN, Other ID Num, and a Comment field.
- Contact Information:** Zip Code: 55555, Phone Number: (551) 555-1212, Fax Number, EMail: auditors@anoka.com, and Web Page URL.
- Default Agency:** A checkbox labeled 'Default agency to associate with new Client, Work Order, Library, and Supply records. Checking this will automatically UNcheck this box for all other Agency records (ie. Only one Agency record can be the Default record).' is checked.
- AGENCY:** A search dropdown menu set to 'by Name' with a list showing '1' of '3' items. Buttons for 'Copy' and 'Del' are present.
- REPORT:** A dropdown menu set to 'Scheduled Audits'. Buttons for 'Preview', 'Print', 'PDF File', 'Snapshot File', and 'Explore' are available.
- Select Clients:** A button with a '2' in a box and the text 'selected'.

1/24/05

23